



Telecommunications Case Study

Fundation — Financial Services/Lending

Impact:

Seamlessly transitioned a small-business lender to a new phone service provider and migrated the company's teams to Zoom.

Challenges:

- Working with a phone service provider and experiencing service issues.
- They needed the ability to field calls on behalf of the company's white-label clients and accommodate a complex telephone routing system, including the need to offer omnichannel capabilities.

Process:

- Helm guided the client through the discovery, contracting and implementation phases of the process and allocated an account management team for ongoing support.
- Helm also advised and assisted with the integration design between the Five9 and Zoom platforms.

Results:

- Seamless transition from legacy provider and an early termination of services.
- *100% of the company is on Zoom voice with the customer-facing team utilizing Five9.*

What Our Clients are Saying:

"A lot of times people don't know what they want. Having a guiding force and SME helps steer you to make an informed decision. Without Helm, I'm not sure we would have arrived at the decisions that we did."

"Alex Miranda, our PM, was able to help us and work through a potential issue in minutes, not days. There every step of the way."

It starts with a conversation...

For more information, get in touch at

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Client Profile:

FUNDATION

Industry: Financial Services/Lending

Fundation enables banks and B2B vendors and suppliers to empower small business customers through best in class, digitally delivered credit products.

Helm Partners is a strategic advisory firm providing detailed analytics, market-driven intelligence, and dedicated resources to quickly and effectively deliver value in the telecommunications space.

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